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ABSTRACT

The purpose of the evaluation is to inform the Leadership Training Institute (LTI) staff how well they performed their responsibilities during 1972-73. The procedures for gathering information on which the evaluation is based include: (1) a personal interview with each LTI staff member; (2) personal interview with appropriate Bureau of Libraries and Learning Resources, United States Office of Education (BLLR/USOE) staff; (3) telephone interviews with directors of 1972-73 institutes; and (4) a review of products produced. Because of the unavailability of participants' names and addresses, in addition to lack of time and money, only four members of the LTI staff, two representatives of the BLLR/USOE and 10 directors were interviewed during July, August, and September 1973. All available products were reviewed during August and September 1973. The conclusions and recommendations include: (1) most of the 1972-73 goals for LTI were achieved to a fairly high degree; and (2) the establishment of more realistic, less global goals is recommended. Detailed conclusions are listed, along with recommendations, in addition to appendixes. (WCM)

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Evaluation of

Leadership Training Institute

1972-73

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IR 000 788

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October 31, 1973

Evaluation of
Leadership Training Institute

Florida State University
1972-73

CONTEXT OF THE EVALUATION

On June 1, 1973 the evaluator was asked to serve as an "outside" evaluator to assess the effectiveness of the 1972-73 Leadership Training Institute (LTI) which operated under a contract from the Bureau of Libraries and Learning Resources (BLLR), United States Office of Education to Florida State University. Since the request came at the end of the program, a post hoc or summative evaluation was mandated. The procedure involves: (1) discrepency analysis (the degree to which original objectives of the LTI were achieved); and (2) impact analysis (the immediate effect of the LTI on its primary audience).

The primary purpose of the evaluation is to inform the staff of the LTI what has worked (and how well) and what hasn't worked. It should also serve as anobjective report to the training staff of the Bureau of Libraries and Learning Resources.

The procedures for gathering information upon which the evaluation is based include:

1. Personal interviews with each LTI staff member;
2. Personal interviews with appropriate BLLR/USOE staff;
3. Telephone interviews with directors of 1972-73 institutes; and
4. Review of products produced.

Content for each series of interviews was reviewed by the LTI staff to be sure that comprehensive interviews would be conducted and appropriate information elicited.

The original plan called for interviews with a sampling of institute participants to determine the ultimate effects of the institutes on the designated audiences. The unavailability of participant's names and addresses and the lack of time and money to carry the evaluation to this audience prevented this step from being carried out. While these data might have been useful, the primary audience for LTI activities is the directors and therefore the emphasis was placed on this group.

Four members of the LTI staff, two representatives of BLLR/USOE and ten directors were interviewed during July, August and September, 1973 to gather data upon which evaluations could be made. All available products were reviewed during August and September, 1973.

The evaluator met with the entire LTI staff on June 26, 1973 to review the recommended evaluation process. The purpose of this meeting was to determine the appropriateness of the issues being explored, the utility of the proposed questions, and the acceptability of the proposed procedure. As a result of this meeting, the procedures were modified and the proposed interview formats were developed. One major criterion which permeated the meeting was the degree to which evaluation needs of the staff could be met through the proposed procedure.

The judgments in this report are the sole responsibility of the evaluator. Once the data were gathered, the analysis and interpretations were made as objectively as possible. Errors in judgment could be caused by (1) a small population; (2) inadequate data collection procedures; (3) insufficient data; or (4) lack of the evaluator's perception.

The goals of the LTI are used as the base reference point for the evaluation. Goal statements are somewhat broader than statements of objectives, but the goals stated in the original proposal are sufficiently specific to permit assessment.[1]

A. To achieve improved leadership training skills and competencies for federally funded institute directors and their key staffs, and for other persons designated by the Associate Commissioner, BLET (BLLR).

Evaluation. Leadership training skills were apparently defined as evaluation competencies and communications skills. To achieve this goal, three workshops were held and two products were developed: (1) an evaluation manual and (2) a communications package. According to the January-February, 1973 Report to BLLR, in two of the three workshops, "almost 99% of the participants felt that the planning/evaluation concepts presented will be helpful in current and future training activities." 80% of the participants in the third workshop indicated the utility of the concepts. However, when the directors were contacted, 60% indicated that they had not used the evaluation concepts. 20% indicated that they were not able to use the evaluation ideas because

[1] The original proposal stated a series of "activities" which were derived from the goals. Activities are interpreted as means for attaining goals and therefore are not judged specifically.

they came too late in the program and 20% indicated that they had used some of the evaluation principles. There is clearly a discrepency between the perceived usefulness of evaluation principles at the end of the workshop and the actual use after that time.

Perhaps the terms, "skills" and "competencies" are too strong. There is no evidence of any director having gained new or improved leadership training skills or competencies in evaluation (or any other area) as a direct result of LTI's efforts. If the goal read, "to create an awareness of new leadership training procedures," or "to provide guidelines for improved program operations" it would be easier to report successful attainment of the goal, but "skills" and "competencies" - no.

In another area of leadership training, LTI provided the conditions, through the meetings of directors and other invited guests, to gain skills in management of institutes. The opportunities given during these meetings to share ideas and procedures were perceived by most directors as helpful. Again, "skills" and "competencies" probably were not gained but new ideas and procedures for institute management were exchanged and eventually used in several institutes.

Apparently some progress toward this goal was made in the area of communication skills. Several directors reported that, as a result of LTI efforts, they were able "to work more closely with students" and were "more sensitive to student comments."

It is difficult to assign cause and effect relationship here. Some of the directors were exposed to preliminary versions of the communication skills package which may have provided new insights which were ultimately used. However, strong positive statements regarding the site visits made by Bené Durant might lead one to believe that her attention to student concerns, which was pointed out by several directors, might have led to the improvement of communications. It seems that Ms. Durant served as an ombudsperson or medium through which information and feelings were passed from student to director and director to student. Causal factors may not be important here. LTI had a role to play in improving communication and attending to student concerns. Whether "improved leadership training skills and competencies" in communications were gained by the directors and staff members is another question.

B. To inventory, assess, and establish priorities for critical training needs in the library and media professions.

Evaluation. There is no evidence that any list or documentation of training needs exists nor that any systematic procedure was followed "to inventory, assess, and establish priorities for critical training needs...." The need for training in evaluation was perceived by directors to be determined by LTI or BLLR. Actually there was some indication from the 1971-72 directors that evaluation assistance was needed. This fact was picked up by the 1972-73 staff when the grant was shifted from USIU to FSU. Whether or not this was the most critical training

need or not was never established. Directors seemed to have a long and varied list of other training needs that they would have preferred to address.

During each of the five meetings sponsored by LTI there was an attempt to elicit needs in a more or less informal fashion. Most of these needs were immediate, institute-related concerns - not the longer range needs and priorities of the profession (as the goal statement indicates).

During the site visits additional needs were identified but, again, these tended to be immediate institute-related concerns and not those of wider perspective.

The opportunity for achieving this goal might have come out of the October "training guidelines" meeting but, apparently, the product was a series of recommendations for the 1973-74 institute/fellowship/traineeship program. The guidelines are more procedural than programmatic and therefore do not help to achieve this goal.

Since no list of training needs and priorities exists, it must be concluded that this goal was not achieved. However, there appears to be sufficient outcroppings and indicators from the various LTI activities to generate such a list.

C. To coordinate all of the LTI activities to provide effective interchange of information between the Bureau, the Institute, a variety of constituencies, and related major professional

bodies and to provide these components of the total training venture with appropriate bulletins and reports.

Evaluation. This goal relates to the communication and clearinghouse functions. The primary relationships are:

LTI to Institute Directors and Institute Directors to LTI

BLLR to LTI and LTI to BLLR

Secondary relationships are:

LTI to ALA, AECT (and perhaps ASIS)

LTI to other nontraining programs sponsored by BLLR and USOE

While this goal was achieved, it was uneven in quality. Highest marks go to the LTI staff for being responsive to individual specific requests by institute directors. About half the directors sensed that LTI could be a helpful resource for answers to questions about institute operations, resource people, placement of graduates and, on occasion, interpretations of BLLR communications and expectations. Since responses to these special requests were so timely and useful, the same individuals tended to come back for help. They were satisfied with the assistance they received. On the other hand, about half the directors did not know (or care?) about help available from the LTI office.

The personal service seemed to stem from contacts made at the various meetings sponsored by LTI and from site visits. The site visits were cited as being of special help in establishing liaison with LTI.

The attempt to publish a newsletter met with mixed feelings.

Only three specific "memos" to directors were identified. Several directors said they knew nothing about LTI until the notice of a meeting arrived. Several said they had almost no contact with LTI except for the meeting. The general ambivalence regarding printed communications is best demonstrated by two directors: the first said the newsletter was useful and the second said it would be good to have a newsletter. The mode response was that the number of contacts with LTI were "about right" and the quality of the contacts was "helpful".

Communication between LTI and BLLR is another matter. It appears as if a variety of approaches were tried to optimize communication. These efforts can best be described as successful at times and unsuccessful at other times. The unevenness of the communications was due to the search for the best way to achieve it. Personality variables always affect communication and there is no exception in this case. No good would be accomplished to single out individuals and the barriers which each one used to screen messages. While the conflicts were not major, they pose warnings for future relationships. For instance, BLLR feels that LTI's reporting was inadequate during the first year while LTI feels that BLLR's paternalistic attitude caused blocks to communication; BLLR indicated that meetings between the two staffs were infrequent, yet LTI was asked to stop attending BLLR staff meetings after being invited and actually attending several

sessions. These are typical perceptions of ambiguous relationships which were well on their way to resolution at the end of the fiscal year.

There is no evidence of LTI's influence on or communication with professional associations other than appearance at ALA and several state library meetings but without substantive inputs. Individual staff people were visible and conducted a considerable abount of business with institute representatives but almost no interchange occurred between LTI and the associations. The relationship with the Association for Educational Communications and Technology (AECT) was contractual in nature; i.e., the production of a sound filmstrip. Even this relatively minor involvement between the two groups produced a positive affect both ways and is to be commended as a first step.

One fortuitous relationship which helped to achieve the goal was the use of library schools in Atlanta and Denver to serve as hosts for the meetings held there. This arrangement offered an excellent vehicle for interpreting LTI's program to new audiences.

The goal was achieved through members of the LTI staff interacting with other programs. For example, the exchange of quarterly reports between LTI and the Center for the Study of Information and Education (CSIE) at Syracuse University and the LTI Director's attendance at the National

Advisory Board meetings of CSIE served as an information exchange mechanism.

D. To provide technical assistance to other ongoing BLET (BLLR) training programs through appropriate activities such as consultations, on-site visits, etc.

Evaluation: This goal was achieved more than any other goal. The LTI was most responsive to several special request initiated by BLLR during the course of the year. These activities tended to extend the visibility of LTI and to fulfil BLLR expectations. The staff is to be commended for immediate response to technical service requests.

One of the most significant successes in this area was the site visit program. All institutes were visited and comprehensive reports were written. This procedure allowed LTI staff to be briefed on progress in each of the institutes and helped institute staffs and participants to better understand the role and potential resources of the LTI. 60% of the Directors specifically mentioned the site visits as being especially helpful. No one indicated dissatisfaction.

The meetings which developed guidelines for paraprofessional training and institute/fellowship/traineeship guidelines were especially productive. The latter session produced "substantial inputs" for the 1973-74 guidelines. This activity must be designated as a success. The utility of the

paraprofessional guidelines is more doubtful. There is no evidence of their use but this does not deny the quality of the product.

The assistance which LTI provided in organizing REFORMA, a group of Spanish-speaking librarians helped to create a quasi-official group which met for an initial meeting sponsored by LTI and a follow-up meeting at ALA where future plans for the group were developed. While this effort required minimal contributions from LTI, it can be viewed as a successful component of technical services.

The publication of Using Your Nation's Capital - An Indexed Guide to Multimedia Resources in Washington, D. .C. was received by library science students and faculty in the Washington area with enthusiasm. This project was picked up from the previous year's contract and completed. The publication is well-organized and offers additional evidence of LTI's ability to respond favorably to technical service requests.

E. To respond to sudden emerging training needs noted by the Bureau and/or components of the LTI, with appropriate task force activities capable of addressing such issues.

Evaluation: This goal is actually very close to the previous goal statement and therefore, the above comments apply.

Of particular note was the "sudden emerging training need" which brought together the REFORMA group and the needs which

were discovered during site visits and handled immediately by LTI staff when its representative returned. The continued telephone calls and correspondence from the directors were handled expeditiously and to the satisfaction of the requestor.

F. To provide a variety of specific functions which will help implement and broaden the effectiveness of the Institute: e.g., the development and operation of relevant training activities; subcontractual activities as needed; the development of appropriate training models; and the design and implementation of leadership training activities focused on special priority topics.

Evaluation: This goal appears to be yet another extension of the "technical assistance" goal. Some of the "activities" stated in the original proposal were subsumed under other goals, e.g., "preparation and dissemination of periodic newsletter," "revision of program guidelines," and "coordination with other Bureau activities to achieve national priorities related to minority library program development." These elements have already been assessed.

"The preparation and dissemination of selected training program analyses" was defined as the organization and editing of previous Title IIb reports (from ERIC) to provide guidance to present and future directors. This has been referred to as the "what we have learned" project. This project was begun during the current fiscal year but was not finished and therefore it is not possible to judge its contribution.

The "development of institute training models" was accomplished in the "preparation and dissemination of selected training program analyses" and incorporated into the 1973-74 guidelines which is an indicator of success.

The major accomplishment in this goal area is the "development of appropriate leadership training materials" and the "commissioning of subcontractual activities." The writing, testing and revision of an evaluation manual was one specific product of this effort. Also, the creation of a communications training package (COMPAC) was an additional product. (Evaluation of the products is located in a separate section of this report.) The communications training package was subcontracted to Concern, Inc. The production of a sound filmstrip regarding the Philadelphia Action Library, Building Bridges to the Future, was subcontracted to AECT.

The evaluation on this goal must rest on the "development of appropriate leadership training materials." Since subcontract activities were carried out, one might say that this goal was reached. The quality of the production and the timeliness of the delivery is discussed elsewhere.

The comments of the directors would give rise to questioning the appropriateness of the materials developed. The need for the materials was based largely on the perceptions of the LTI staff, some of whom had heard expressions of need in these areas during the previous year. Some directors felt that

"evaluation was the answer" no matter what other needs were articulated. On the other hand, the evaluator explored other needs while interviewing the directors and received a laundry list of some twenty discrete items. Perhaps evaluation and communication skills are the most appropriate areas in which to develop training materials. There was sufficient expression of anticipation from the directors that would cause one to believe that these materials are welcome and will be used.

The basis for the production of the sound filmstrip on the Philadelphia Action Library was never explained by anyone interviewed except by the nebulous phrase that a former Bureau employee wanted to have the project documented for dissemination purposes.

IMPACT EVALUATION

Objectives (or goals) can be stated and achieved but unless those goals are significant and contribute to the common welfare of those involved, achievement is a hollow exercise. The goals of the LTI for 1972-73 were important as well as flexible. The flexibility permitted the Bureau and LTI staff to move as emergent needs dictated. From the analysis and evaluation in the previous section it can be said that the goals were achieved to a high degree and that if the label of success can be assigned to attainment of goals, LTI was successful. But there is more.

What difference has LTI made in the library world? Are people (involved with institutes) any better because LTI existed? If LTI weren't there, would it be missed? Is the investment paying off? Questions like these get to the heart of an evaluation - the impact on those who come into contact with LTI staff and activities during the year.

When the LTI Director was asked about his disappointments during the past year, he responded by saying, "There's so little evidence of success." This is partly true (and will always be so) in any educational enterprise which involves interaction between teachers and learners. The results of the relationship cannot be observed for many years. But there are evidences of success which crop up as indicators during interviews and conversations. The impact evaluation is based on these indicators. It must of necessity be more subjective since data are fragmentary and inferential. It may be more important than the discrepancy evaluation which is much more objective and data-based.

On the Concept of Impact and LTI

Very rarely can there be impact without some action. Using this truism as a basis one might ask, "What did LTI do and what effect did it have as a result of these actions?" An analysis of LTI's list of activities would yield some immediate short term effects (which were largely discussed in the discrepency evaluation section) and some long term effects (which have yet to be assessed).

This was a year of role exploration for LTI. While the goals stated in the original proposal provided some direction, they permitted a wide flexibility in program development. While perception of LTI varied among all who came in contact with the staff, there was a strong conceptual unity that LTI is a consultative and information clearinghouse organization, closely related to the Bureau, who exists to help improve library training programs. The perceptions were developed by communication with and observations by individuals outside LTI. It is interesting to note how closely the perceptions of reality and the intentions of the proposal are matched.

This year was spent largely in search of an appropriate role for LTI. Changes of personnel at the Bureau, transfer of LTI from USIU to Florida State University, new staff for LTI, and a new batch of directors caused some confusion as to what LTI was and was going to be doing. That there is any agreement regarding role among the various constituencies at this point in time is a credit to the persistence, visibility and consistency of LTI personnel.

Impact on Directors

At the very least the directors of library institutes are aware of LTI and know that they sponsor meetings which are primarily concerned with evaluation. At best a majority of the directors are satisfied with the services they have received as responses to specific requests. Between the two extremes about one-third of the directors know very little about LTI, are confused about its role or view it as unrelated to their personal institute concerns. The evaluator sensed a feeling of growing understanding and acceptance of the LTI on the part of the directors. Expressions of anticipation for forthcoming products were evident. The directors are beginning to look for more leadership from LTI and expect to find it during subsequent years.

Impact on the Bureau

There is one concept which seems to permeate the thinking of Bureau personnel in regard to the LTI - confidence in the staff. While there have been occasional feelings of miscommunication or poor communication and minor frustrations regarding the handling of several activities, the BLLR staff has demonstrated tolerance for the problems because they were dealing with reasonable people. During the metamorphasis of the 1972-73 LTI, the Bureau viewed this group as a resource for institute directors and as an "extension" of itself in the sense that LTI could perform some of the professional activities which the Training Division of BLLR would like to have performed but were unable to do because of staff and fiscal constraints. The requests for technical services which emerged during the year demonstrated confidence in LTI or else they would not have been

approached to handle such delicate problems as the organization of Spanish-speaking librarians. The Bureau perceives LTI as "an emerging unit" which serves as an information clearinghouse on library training and as a vehicle for reaching institute directors. Ideally, training needs of the profession will be defined through LTI and priorities will be developed by the Bureau. This has not yet occurred.

Impact on the Profession

This is one of the long term effects. The ultimate impact will come as institute participants begin to make professional contributions resulting from experiences during the institute. If any credit can be assigned to LTI it will be remote and obscure. Who knows what impact a Compac film or a technique learned at a workshop might have had on one participant? This is difficult to judge.

The shorter term effects are easier to assess but much less dramatic. In this evaluation no systematic attempt was made to assess the impact on the profession. Casual observation and conversation would lead to the opinion that there has been very little impact on the profession as a whole as a direct result of LTI's efforts.

Impact on the LTI Staff

Impact of LTI on LTI staff? Yes, this is a vital component of the evaluation. LTI is an all-consuming activity for the staff. The dedication and zest demonstrated by each person is a delight to observe. During the interviews each person mentioned working with others on the staff as one of the satisfactions. There is a good esprit de corps and mutual respect for one another. LTI has become a mission for each

individual involved. The basic concerns are people concerns, products seem to be secondary. Each person has unique professional capabilities and unique personality characteristics and all these qualities appear to be complementary. LTI has become a way of life for each staff member. This sense of mission, professional capability, and warm, human concern is communicated to those who associate with the staff. The result is the establishment of empathetic relationships which assist in accomplishing LTI goals and increasing its impact on others.

PRODUCT EVALUATION

Four major products were initiated, developed and produced during the 1972-73 fiscal year:

1. Planning and Evaluating Library Training Programs, an evaluation manual for institute directors
2. Compac - a communication skills package
3. Using Your Nation's Capitol: An Indexed Guide to Multimedia Resources in Washington, D. C.
4. A sound filmstrip, Building Bridges to the Future

Planning and Evaluating Library Training Programs[1]

The manual offers a comprehensive overview of the evaluation process with special attention to library training programs. While Stufflebeam's CIPP model (Context, Input, Process, Product) is emphasized, the contributions of other evaluation specialists are appropriately noted. Most evaluation processes are theoretical until they are applied. This manual is no exception. In order to overcome the theoretical stigma, extensive examples are used. The examples are based on library training programs.

Special commendation should be made for the way in which the manual was developed. All persons who participated in the process are credited. The message is that this volume is not the product of one person's thinking, one person's procedures, and one person's values. The diverse concerns of the group for which it intended were factored into the synthesis of the process evaluation approach.

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[1] This assessment was made using the "working copy" of the manual, not the finished product.

The volume is a happy compromise between providing scanty superficial information and overly comprehensive information which tells the reader more than he/she wants to know. This is a practical handbook for directors of library institutes - nothing more, nothing less.

The generous appendices should also be useful for the directors. Again, specific examples offer touchstones for evaluation formats which might be developed for the unique requirements of each institute.

The real test for this product will come with its use. The draft appears to be one of the best publications of its type.

Compac

This multimedia package was developed in response to a need perceived by the LTI staff. It is designed to be used in library training programs over approximately three days for the purpose of increasing awareness of the need for better communications both within the professional education program itself and as individuals deal with clients in library environments. It contains a 17 minute film (TRANS action), a slide/tape presentation, a videotape, audiocassettes and a teacher-participant manual.

Unfortunately, the entire package has not been completed and therefore could not be evaluated. Only the film was available for preview.

To preview and evaluate a film out of context is a dangerous procedure, especially when it is part of a larger system. This film almost stands alone as an introduction to transactional analysis. It draws heavily on the publication, Communication, an issue of the Kaiser Aluminum News edited by Don Fabun. It is a useful film to introduce basic concepts in communications, with emphasis on transactional analysis.

The library applications are obvious and appropriate. There are some technical shortcomings which are supposed to be changed before final release.

The LTI staff is proud of their efforts in developing this package which has been subcontracted to Concern. The directors look forward to using the materials.

Using Your Nation's Capitol: An Indexed Guide to Multimedia Resources in Washington, D. C.

There is probably no reference work like this resource. The many and diverse information resources of the Washington, D. C. area are well-organized and described thoroughly. There are more sources than this evaluator has ever seen in one publication before. The specificity of the information is a major asset: names, addresses, telephone numbers, functions, services and titles of additional references in all media formats.

The obvious limitation, listing sources only in the Capitol area, may not be as sever a deterrent to using the reference as a listing of sources in Davenport, Iowa. Since the Nation's Capitol is a resource for the entire Nation, individuals from all parts of the country should have access to Washington's resources. Many people from all states do, in fact, write and visit many of the organizations listed for assistance. But there is a definite advantage for people living and working in the Washington, D. C. area.

The test of this volume's utility will be in the actual use it receives by those who read it. It does have the potential for being an extremely helpful volume to those who are trying to find specific sources in the Washington area.

Building Bridges to the Future

This sound filmstrip, produced by AECT on a subcontract from LTI, is a good visual report of the Philadelphia Action Library. It is designed for librarians and interested individuals in any community. Librarians who view the filmstrip should be moved to consider new services which they might offer to the community. For the community, it should help to develop interest in and support for a new type of library with extended services.

The filmstrip is technically excellent. The visuals are appropriate and the audio is good. The use of actual voices of the people involved adds credibility to the presentation.

Plans for distribution of the filmstrip were not available at the time of evaluation.

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

1. Most of the 1972-73 goals for LTI were achieved to a fairly high degree.
2. The goals were sufficiently flexible to permit additional activities to be performed as needs emerged.
3. The LTI did create in the directors a new awareness of evaluation.
4. Training needs and priorities were not determined in direct response to 1972-73 director's needs.
5. LTI provided a useful, personalized information service for directors who made specific requests.
6. LTI provided substantial input for BLLR training guidelines.
7. Communication between LTI and the directors was adequate; between LTI and BLLR it was uneven but there was evidence of improvement toward the end of the year.
8. LTI was able to respond quickly and adequately to BLLR's requests.
9. LTI did not demonstrate any visible impact on the library profession.
10. The products generated during the year were well done but not all were completed.
11. The LTI staff was competent, helpful, cordial, and skillful in handling its varied activities.

A Conclusion to the Conclusions

In the final analysis one must raise the question, "Was LTI worth the investment?" The evaluator must answer with some degree of subjectivity. "Yes, there was responsible stewardship of the funds and along with many specific accomplishments, there were contributions which may never be measured."

The trauma of transition from one institution to another; the ambiguity of LTI's role; the clarification of communication channels among diverse groups in diverse parts of the nation; the logistics of staffing and location - all these events and problems were overcome and still there was a good yield of LTI visibility, direct assistance to directors, direct help to BLLR in response to immediate needs, several products and a viable organization to better meet the needs of the subsequent year. This year must be considered as a year of transition, clarification and new direction. LTI has an excellent, cohesive staff who share common goals and respect the abilities of one another. The proposal for the second year reflected lessons learned during year one and developed more specific objectives based on experience. The Bureau also appears to be more satisfied now that the LTI is established and moving in consort with its program.

After assessing goals, impact and products, there ia a feeling that the whole is greater than the sum of its parts.

Recommendations

Several of the recommendations have already been considered and incorporated into the 1973-74 design for the LTI. They are included in the

total list as a matter of record.

1. Establish more realistic, less global goals. Statements of objectives would offer better guidance and better serve the purpose of evaluation.
2. Evaluation guidance should be provided through the evaluation manual and on an individual basis as requested. Do not repeat the workshops on the evaluation process.
3. Deliberately move to determine needs and priorities in the library field. (A meeting of association executives and/or deans of library schools would help to move toward this objective.)
4. Continue technical services to directors and the Bureau; retain some flexibility to respond quickly to emergent needs.
5. Continue the site visit program.
6. Develop a regular newsletter to maintain contact with directors and to serve an exchange of ideas among institutes.
7. Field test the products developed this year to determine the degree to which they achieve the original objectives and to make recommendations for optimum use based on the field test data.
8. Through intimate contacts with the library field LTI is in a position to help the Bureau determine its role in training. A plan should be mounted to achieve this end.
9. Plans should be instituted to develop a stronger impact to the library profession within the framework of the LTI program.
10. Consider ways in which LTI might be able to assist directors in handling the cross-cultural situations which characterize most institutes.

11. Continue relationships with institute directors which began in 1972-73 even though some institutes have terminated.

12. Help institute directors to document activities for purposes of reporting and sharing ideas.

13. Initiate activities based on observed needs, not just those which the Bureau perceives as necessary.

APPENDICES

Evaluation Plan 1972-73

Letter to Institute Directors

Persons Interviewed

Interview Schedule for Directors

Interview Schedule for BLLR Staff

Interview Schedule for LTI Staff

EVALUATION PLAN
LTI
1972-73

Since the evaluation must necessarily be post hoc, two major dimensions will be assessed:

1. Discrepency (the degree to which original objectives of LTI were achieved); and
2. Impact (the immediate effect of the LTI on its primary and secondary audiences)

Discrepency Evaluation

Each goal and its related activities will be examined to determine whether or not it has been accomplished and if it has, the degree of success. The procedures for gathering this information will include:

1. Personal interviews with each staff member and BLLR staff concerned with training
2. Telephone interviews with each of the institute directors
3. Questionnaires from each of the regional institute participants.

The line of questioning for each of the procedures will be derived from the goal and activity statements as they appear in the proposal. For example, the first goal is concerned with "more adequate leadership training skills and techniques for institute directors..." and the first activity has to do with "identification and assessment of training needs." Questions might be:

- What specific training needs have been fulfilled by LTI?
- Are there other training needs which ought to receive high priority as the LTI develops its plans for this year?
- At the beginning of your institute, in which of the following areas of training did you need help? (Rank order) ____evaluation ____communication skills ____use of audiovisual media ____interpersonal relations ____institute management ____innovative practices ____others

- Rank order the list as you perceive your training needs today.

Product Evaluation

Each of the products will be reviewed along with field test data. The evaluation manual will be reviewed by two evaluation specialists and the LTI evaluator. The communication skills package will be reviewed by the LTI evaluator and two specialists in communication skills. Since these products have not been used in their final forms, evaluation will be performed on their technical quality and impact potential.

Impact Evaluation

The impact dimension will determine intended and unintended outcomes of LTI activities on (1) institute directors; (2) institute participants; (3) faculty members not directly involved at institutions where institutes were held; (4) staff of the Bureau and (5) staff of LTI.

Each group will be identified as completely as possible and a sample will be determined depending upon the total population. The initial sample will be contacted by telephone while the remaining number will receive questionnaires.

The line of questioning will be open to permit maximum flexibility of response. For example, the evaluator will ask for specific examples of new or modified behaviors which can be directly attributed to LTI influence.

Validation Check

The data from the discrepency and impact analyses will be synthesized and tentative evaluation statements will be made. Then, the data on file in the LTI office will be examined to determine the extent of congruency between the two data sources.

Center
for the Study of
Information and
Education

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To: II-B Institute Directors Date: July 18, 1973

Re: Evaluation From: Donald P. Ely

I have been asked by Harold Goldstein to be the "outside" evaluator for the Leadership Training Institute (LTI) funded by the Bureau of Libraries and Learning Resources of USOE. The purpose of this evaluation is to report back to the LTI staff how well they performed their responsibilities this past year. If the evaluation is done well, the feedback should help to improve next year's activities.

I will be calling you sometime within the next two weeks to ask you a few questions regarding the assistance which LTI has provided during the past ten months. Your responses should be candid and constructive. You will not be quoted with identification unless you request it.

The call should take 15-20 minutes. If it is not convenient to talk when I call, perhaps we could arrange for a specific time later that day or the next day.

Thank you in advance for your contribution. I am convinced that our cooperative efforts can yield useful guidance for our LTI colleagues.

Sincerely,

DPE/mm

Persons Interviewed

Directors

Elise Barrette, East Tennessee State University	8/10/73
Alvin J. Goldwyn, Case-Western Reserve University	9/04/73
Norman Higgins, Arizona State University	8/03/73
Virginia Lacy Jones, Atlanta University	9/04/73
John R. Loughlin, University of New Hampshire - Merrimack Valle	8/03/73
Junius Morris, Highline Community College	8/03/73
Patrick S. Sanchez, California State University - Fullerton	8/09/73
Laurence Sherrill, University of Wisconsin - Milwaukee	7/30/73
Fleming A. Thomas, Burlington County College	8/16/73
Tommie Young, North Carolina Central University	8/03/73

LTI Staff

Dorothy Anderson, Associate Director for Coordination	9/24/73
Bené Durant, Field Consultant	7/17/73
Harold Goldstein, Director	8/02/73
Brooke Sheldon, Associate Director for Training	8/02/73

BLLR Staff

Dick Hayes, Acting Associate Commissioner	8/01/73
Frank Stevens, Program Manager, Library Training	8/01/73

Interview Schedule for Directors

I'm Don Ely, the "outside" evaluator for the LTI. The purpose of the evaluation is to report back to the LTI staff, how well they performed their responsibilities this past year. If the evaluation is done well, the feedback should help to improve next year's activities. The evaluation is not for USOE/BLLR directly, although they will see a copy eventually. I am trying to help the LTI staff to know what worked; what didn't work; and the degree of success or failure. Your name will not be identified separately unless you request that I do so.

1. Think back to the time when you learned that you would be running an institute. What kinds of needs did you have at that point? (Let me illustrate further - information on evaluation? _____; ways of teaching communication skills? _____; interpersonal relations? _____; use of audiovisual media? _____; institute management? _____; recruitment? _____) What were the two most important needs?

2. What specific training needs have been fulfilled (partially or completely) as a result of LTI's efforts this year? (Are you doing anything differently because of LTI?)

3. Are there areas which LTI has not considered which ought to be?

4. Can you describe for me the priorities for critical training needs for the library and media professions? _____ Is this your list or does it reflect the thinking of the BLLR? Did you participate in any formal discussion regarding these priorities sponsored by LTI?

5. Approximately how many communications did you receive from LTI this past year? newsletters and general mailings _____; personal letters _____; site visits _____ ?

   Could you describe in your own words, what LTI is and what it does?

   Do you wish you had more frequent contact with LTI? (less frequent?) What could LTI provide you that no other organization could?

6. What specific requests have you made of LTI this year? What response did you receive? Are you aware of the various programs in which LTI is involved beyond the ones you mentioned above? (Yes) What are they? (No) Let me tell you about . . . REFORMA, evaluation, a communication skills kit, etc., etc.

Interview Schedule for BLLR Staff

1. Here are the initial goals for LTI during the past fiscal year.

   - Was the goal achieved and to what degree?

   - Was the goal modified?

   - Will (should) the goal continue through next fiscal year?

2. Specifically (if not covered above)

   - To what extent did LTI contribute to the establishment of BLLR training priorities?

   - To what extent did LTI recommendations for training guidelines emerge in the final guidelines?

   - What technical assistance was particularly helpful?

Interview Schedule for LTI Staff

1. Do you have any reactions or suggestions regarding the evaluation procedure outlines in my statement?

2. What has your primary role been in LTI this year? What did you actually do?

3. What are some of the satisfactions which you derived from your work?

4. What were some of the frustrations and/or disappointments?

5. What and how were needs identified and how were they incorporated into this year's program? next year's proposal?

6. What will you do differently next year as a basis of this year's experience?

7. What are some of the outstanding programs when taking everything into account? Which one(s) stand out in your mind?

8. What "payoff" do you feel will stem from these programs? (Are they worth the government's investment?)